REPORTING AND SHARING ON PORTFOLIO MANAGER®

Introduction

Energy use in buildings accounts for about 80% of GHG emissions in Cambridge, with two-thirds of the total related to commercial, institutional, and large multifamily buildings. The Building Energy Use Disclosure Ordinance (BEUDO), enacted by the Cambridge City Council on July 28, 2014, is a key step in efforts to reduce Cambridge's greenhouse gas (GHG) emissions. For more information, visit the Cambridge Building Energy Use Disclosure Ordinance website, linked here.

As part of this process, Cambridge requires building owners to benchmark their energy use and water use; and in order for Cambridge to effectively process all of this data – and then use it to create sound development policies – building owners must report this data to and share it with Cambridge.

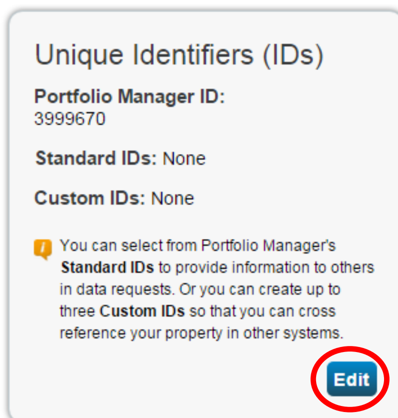
Part I: Enter your Cambridge Building ID – Follow the steps below to correctly identify your property within the U.S. Environmental Protection Agency (EPA)'s Portfolio Manager® tool.

Step 1 – Select a property from the "MyPortfolio" page. On the property page, a second row of tabs will show up. Click on the "Details" tab.

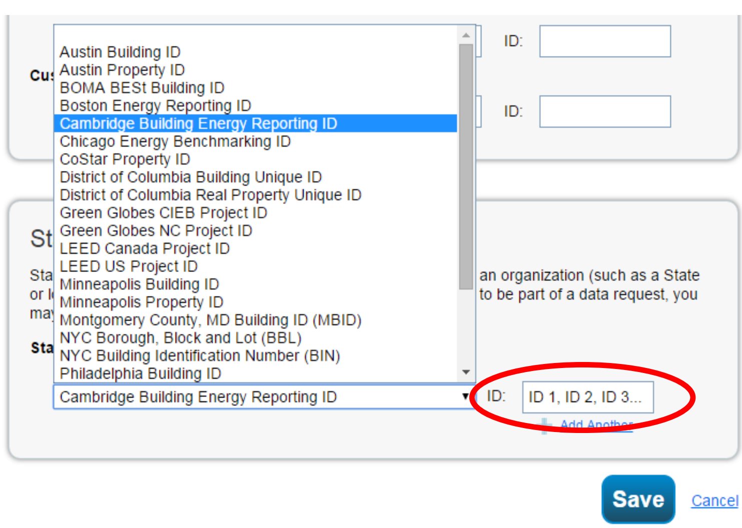
Step 2 – On the bottom left side of the Details tab, there is a box titled "Unique Identifiers (IDs)". Click "Edit".

Step 3 – On the next page, locate the "Standard IDs" box. Click on the drop-down menu and select "Cambridge Building Energy Reporting ID".

Step 4 – In the field next to the drop-down menu called "ID", manually enter your "Cambridge Building Energy Reporting ID" number(s). Then click "Save".



Note: Building IDs have been posted on the Building Energy Use Disclosure website, linked here. There is also a video tutorial on using the Cambridge CityViewer to get the unique building ID, linked here.



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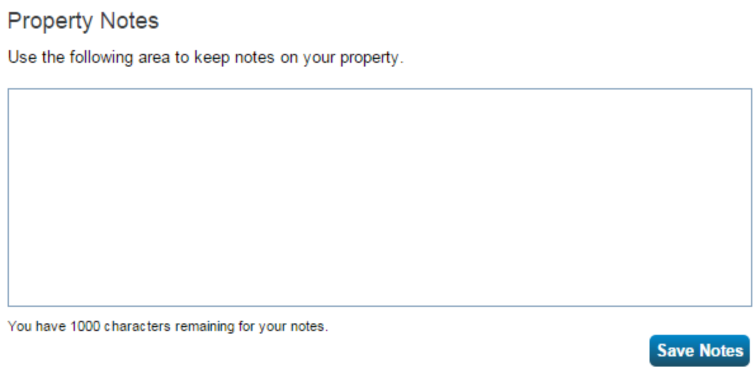
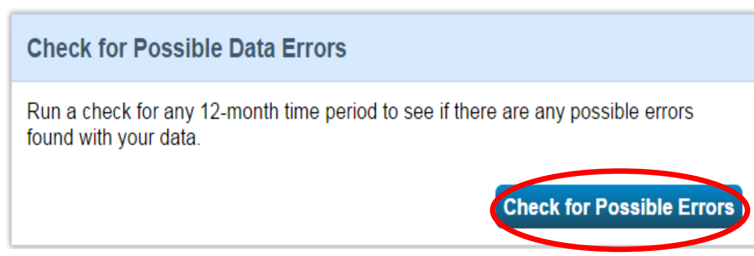
If you are submitting a property in Portfolio Manager that includes energy use for more than one building, enter the unique building ID for one of the buildings in the Cambridge Building Energy Reporting ID field (shown above) and enter ID for all other buildings whose energy use is included in the property record in the "Property Notes" box. The "Property Notes" box is located at the bottom of the Details tab.



Part II: Check Your Property's Data Before Submission – this section of the fact sheet will show you how to use built-in features in Portfolio Manager to ensure you are submitting required data.

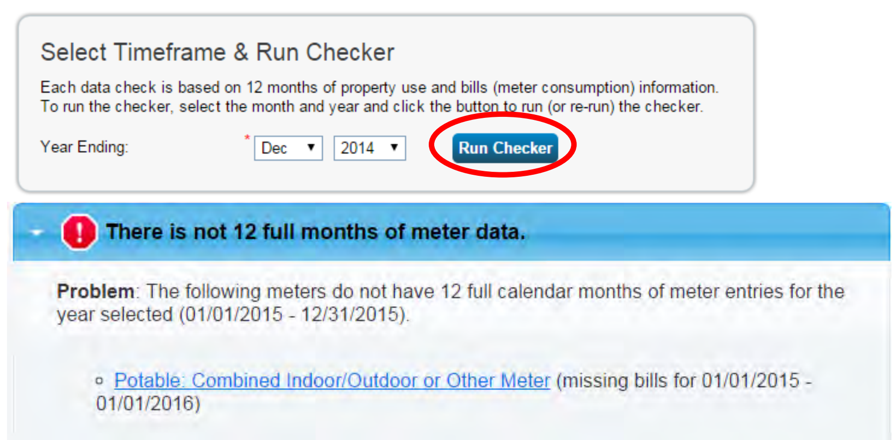
Step 1 – Select a property from the "MyPortfolio" page. On the property's "Summary" tab, locate the "Check for Possible Data Errors" box in the middle of the page. Click "Check for Possible Errors".



Step 2 – On the Data Quality Checker screen, select "Dec 31 2015" from the "Year Ending" fields. This will tell Portfolio Manager to run its checks on calendar year 2015 data. Click "Run Checker".

Step 3 – The data quality results will generate on the same page.

Evaluate the results and adjust any of the errors that the data quality checker identifies for the respective property. NOTE: In order for a property to show complete 2015 data in Portfolio Manager, the energy meters must span from 1/1/2015 through 12/31/2015. A bill ending before 12/31/2015 will result in the alert shown to the right.



Part III: Responding to Cambridge's Data Request – This section will show you how you to respond to Cambridge's data request within your Portfolio Manager account.

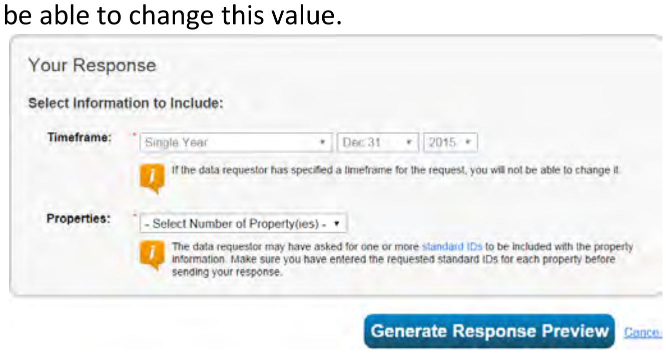
Step 1 – To access the Data Request, follow the link provided here: [Link for Reporting to Cambridge.]

By logging in to Portfolio Manager through this link, you will be taken to the page "Respond to Data Request: 2016 Cambridge Building Energy and Water Use Data Request for Calendar Year 2015".

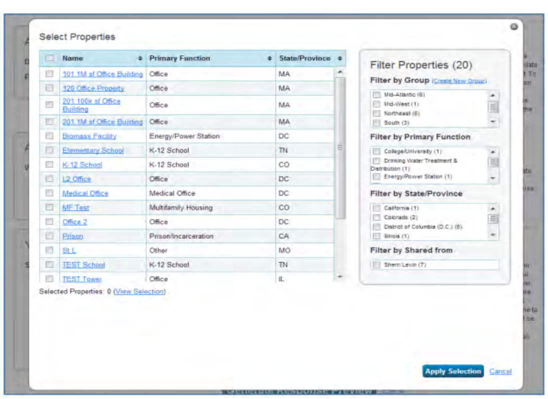
Once you have logged in using this link, you can also access the request by clicking on the "Reporting" tab in Portfolio Manager, scrolling to the "Templates & Reports" section of the page, and clicking in the drop down menu to "Respond to a Data Request".

Step 2 – In the "About Your Response" section, select whose data is being submitted. Select "myself" to submit the response on your own behalf; OR select "someone else" to choose from one of your contacts within Portfolio Manager.

Step 3 – In the "Your Response" section, the timeframe will default to Dec 31 2015. Cambridge has specifically requested 2015 data only, so you will not be able to change this value.

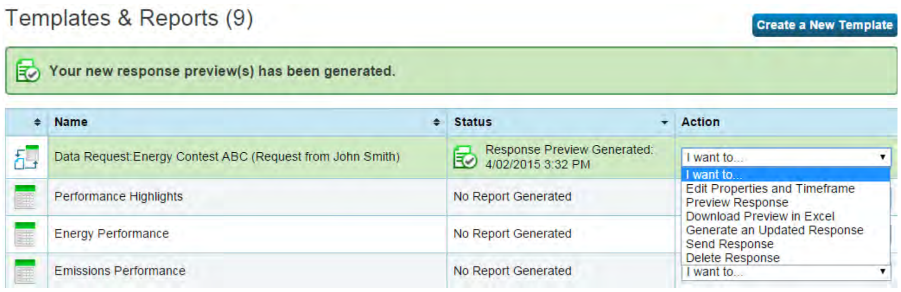


In the properties field, select the properties that need to be reported to Cambridge. If you are reporting multiple properties, select the drop-down menu and click "Multiple Properties". A window similar to the "Select Properties" image to the right will appear. Select all applicable properties by clicking on the checkboxes to the left of the property name, and then click "Apply Selection".



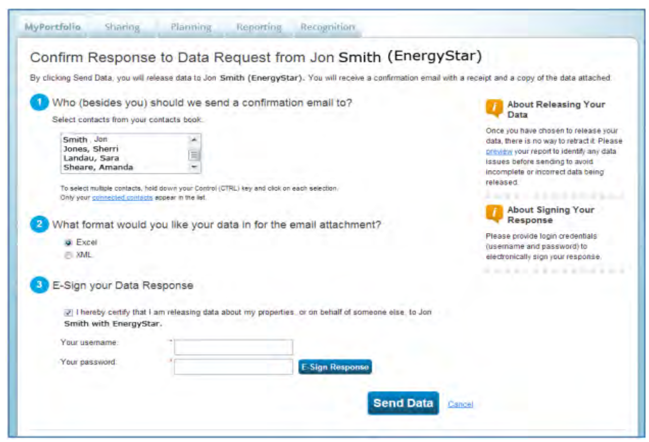
Click "Generate Response Preview".

Step 4 – After you generate the response preview, you will be taken to the "Reporting" tab (you can also access the "Reporting" tab separately to view your response to this data request for future reference).



NOTE: It is recommended that you preview the data being submitted to Cambridge. To do so, select "Preview Response" from the drop-down menu next to the report name. Select "Download Preview in Excel" to review the information in Excel. **Check to be sure you have entered both energy and water data.** If you want to select different properties or timeframes for your response, select "Edit Properties and Timeframe." Finally, If you make these or other changes to property data, select "Generate an Updated Response" from the drop-down menu, and then complete the information on the "Respond to Data Request" page.

Step 5 – After you have reviewed and confirmed the data in the report, select "Send Response" from the Action drop-down menu next to the report name. This will lead you to the "Confirm Response to Data Request" page. You can choose to share this report with multiple people by selecting their names from your Portfolio Manager contact list. Then, ensure that the format of your data for the email attachment is selected to "Excel". You must then "E-Sign" your response by entering your Portfolio Manager username and password. Click "E-Sign Response".



Finally, click "Send Data" to send your data and complete the response. You will receive a confirmation email with a receipt and a copy of the data submitted. Congratulations, you have successfully reported your data to Cambridge!

Contact Information

The City of Cambridge is providing a help desk to assist building owners and their agents in complying with the ordinance; the help desk is operated by ICF International. Questions related to benchmarking in Portfolio Manager, or accessing energy data and building attribute information can be directed to the help desk by contacting:

- energyhelpdesk@cambridgema.gov
- (617) 250-4205